

PROCESSES AND PROCEDURES FOR PROPOSAL SUPPORT

This document sets out a framework for engaging with ISF affiliates to advance faculty success in securing funding for proposals that support ISF's mission to advance knowledge and innovation through a research ecosystem built on interdisciplinary collaborations that maximize the research aspirations of our faculty affiliates. Support for proposal development for ISF affiliates on sustainability projects that align with ISF goals and capacity is without cost.

Principles behind the Process for Proposal Support

ISF promotes a clear and transparent process for supporting efforts to identify, apply for, and launch proposal efforts. The following principles undergird this process:

- All ISF affiliates should be actively encouraged to engage with ISF to discuss sustainability-focused research ideas and proposals;
- Though advising and discussion of single-investigator ideas is supported, this should not be the main focus of services provided. Rather, encouraging and working with faculty on their efforts to develop interdisciplinary grants and larger projects should be the primary goal;
- While we provide services to leadership and other active affiliates, we should encourage participation of all affiliates and seek ways to engage those who have not been actively engaged;
- Any intake form or initial communication should be low-friction and not necessitate extensive information.

Basic Forms to Track the Process

- "ISF Proposal Support Intake Form:" a Qualtrics form, used for initial requests.
- "ISF Proposal Services Form:" documents services to be provided by ISF to the PI or team. It is filled out and agreed to by the ISF Director and the PI(s)
- "ISF Letter of Support:" documents the provision of resources or services to be provided by ISF if the proposal is funded. Typically, one version is submitted with grant, another, with specifics of the text provided in the proposal and related budget, is kept with ISF and the PI(s).
- "ISF Closeout Form:" filled out at the end of the proposal process once the grant is submitted, the proposal is postponed, the proposal is redirected to be supported by another group, or the proposal is abandoned.

Basics of the Proposal Support Process

The basic process, from ideation to closeout, is described below.

Ideation: Proposal ideas come from different directions, including:

- In response to communication to faculty about opportunities;
- Via conversations with affiliates/potential affiliates;
- From direct requests from faculty.

Possible services include:

- drafting timelines;
- outlining RFP and related documents;
- coordinating teaming;
- reviewing sections of proposal including summaries, intros, DMPs, etc, (docs not covered by SPS services);
- providing editing and formatting support;
- reviewing budgeting;
- identifying ISF services for a funded project such as launching director, management or communication services;
- drafting letter of support.

Associated form: ISF Proposal Support Intake Form

Decision: For requests that move beyond a basic discussion, there should be follow up within 3-5 days for next steps and/or a decision about available support, taking into consideration availability and alignment of project with ISF Mission.

Associate form: ISF Proposal Services Form

Note: SPS often works to collate documents including biosketches, C&P docs, collaborator lists, etc, but does not have capacity or expertise to work with a team to develop or review documents such as facilities and equipment, summaries/abstracts, DMPs etc. Typically, any project lead can request proposal writing help from the OOR, but a team will not typically receive support from both ISF AND a OOR grant writer.

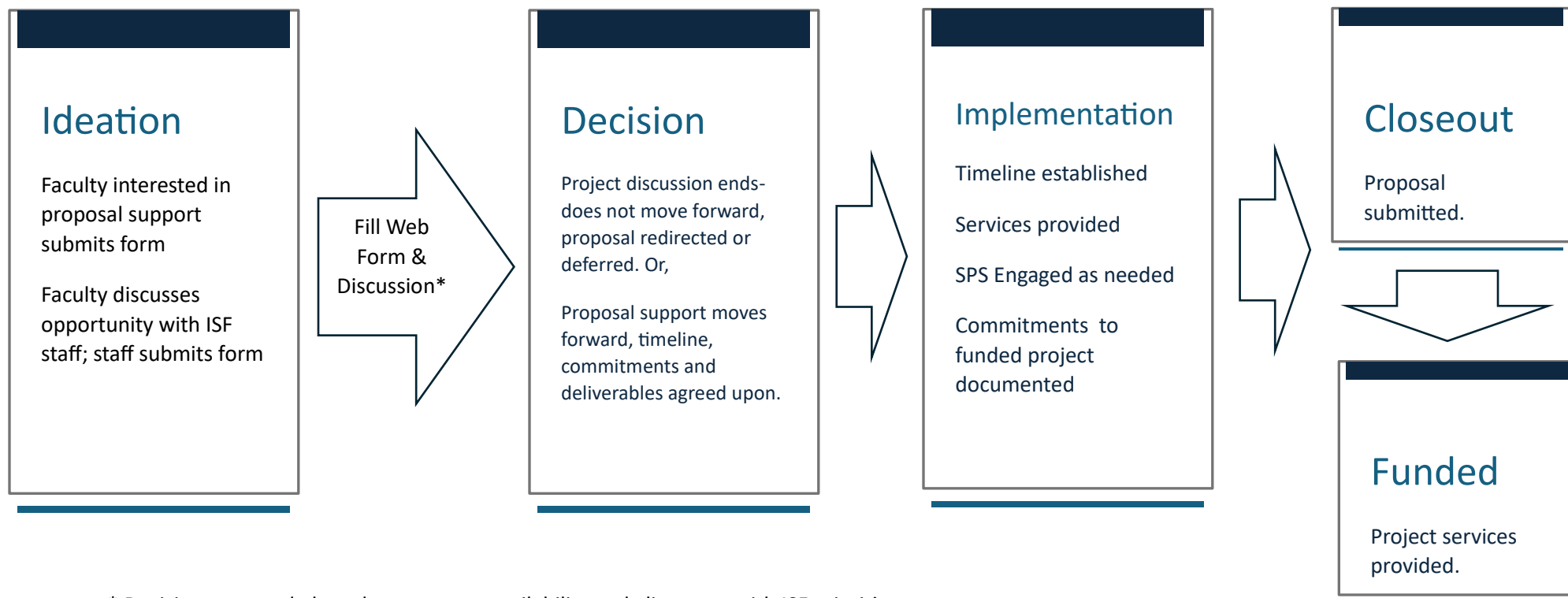
Implementation: in this phase, the managing director, operations manager and others as needed, work with the PI (and team) as agreed upon to provide services to move the project towards submission as a proposal affiliated with ISF in PERA.

Note that if a team is working with a grant writer from OOR, they may still request support from ISF (via a letter of support) for the project if it is funded (ie, writing in role of launching director etc).

Closeout: Closeout occurs at several points. First, it marks the end of a proposal development phase when it is successfully submitted to a funder. Second, it can mark the end of a project if it is abandoned, referred to support from a different source or postponed. Closeout can also occur if a proposal is funded and after ISF conducts the work as outlined throughout the ISF Letter of Commitment.

Note: As a matter of policy, ISF will maintain a copy of the submitted proposal and other work related to the proposal unless otherwise agreed upon. This information is not shared.

Associated form(s): ISF Proposal Close out Form &, if applicable, ISF Letter of Support (internal and external versions as needed to document commitments.



* Decisions are made based on resource availability and alignment with ISF priorities.